

JUDICIAL STAFF EDUCATION COMMITTEE
March 30, 2010
Meeting Minutes

Members Present:

Kip Anderson
Dyhanna Anderson
Shelly Bacon
Theresa Barrett
Laura Beeson-Davis
Mary Blanco
Rafaela de Loera*

JT Hilton
Bob Lawless
Elisa Ochoa*
Kathy Schaben
Mark Stodola
Michelle Wellner
*Telephonic attendance **

Staff Present:

Jeff Schrade
Beth Asselin
Al Sparrow
Deb King
Patty Stansfield
Vikki Cipolla-Murillo
Deanna Carter

1. Welcome and Call To Order:

- a. Mark Stodola called the meeting to order at 10:05 a.m.
- b. Members introduced themselves before starting the meeting.

2. Review Minutes: October 21, 2009 minutes were approved with no changes. Kip moved to approve the minutes. Shelly Bacon seconded the motion. The motion passed unanimously JSEC 2010-01.

3. Program Planning Reports:

- a. JSEC Broadcast: Public Access to Court Records, Rule 123 - February 16, 2010
Webcast: 377 participants. Well attended and good rating. The program targeted management and court leadership (court administrators, clerks of court, presiding judges) and highlighted the recent rule changes governing records, including online access to records (electronic filing, correcting data errors, bulk data requests) and covered planned changes to the Public Access website.

To meet the needs of JSEC, as a follow-up to the webcast, a CBT on records basics will be developed for all staff, teaching records basics, defining terms such as public record, open and closed records; and providing examples of typical records requests and appropriate responses. The CBT target date has been moved to July 2010. Patty Stansfield has been working with the Court Services Division, AOC on this project. In the future, modules may be added addressing specific types of records requests such as juvenile records).

PACR became the first non-satellite program presented statewide to courts. AOC will no longer offer satellite programs in the future. Over 55 courts participated via webcast with success. Education Services received positive feedback from courts on ease of use, cost effectiveness/no travel, convenience and accessibility.

- b. JSEC Broadcast: Law Justice and the Holocaust - April 30, 2010
Registration has been open less than one week - over 260 court staff and 100 non-court attendees have enrolled. Forty-seven courts are participating, some of which will open doors to the public. Attorneys and members of the public are showing much interest in this topic. Public members can register via a public site, registering as a firm, individual, at the State Bar Association or at a court site, on a space available basis. Court employees register via ACORN. Courts should have a laptop, internet connection, speakers, and may need a projector to view this program in a group setting. No other special equipment is needed.

- c. JSEC Broadcast (proposed topic): New Child Support Guidelines – November 2010
New Child Support Guidelines will take effect in January 2011. Theresa Barrett of AOC Court Services Division has requested JSEC hold a statewide broadcast on the new guidelines. The broadcast is scheduled for October 7, 2010. The impact of these changes is enormous and will affect many parties including the State Bar, judges, clerks, division of child support enforcement case workers, and special officers, to name a few. Mini-cast are anticipated following the broadcast to provide additional training to target audiences.
- d. COJET Broadcast: Five of the Legends in the Judiciary – May 2010
This topic was presented at the Judicial Conference and was well received and will be developed into a COJET broadcast. The broadcast highlights 5 court legends and includes interviews with court personnel sharing how these legends impact work in the courts today.
- e. Granicus – Broadcast Center
The new Education Broadcast Center site at <http://supreme22/edu/videos.htm> is available to all court employees with internet access. Employees will view statewide broadcasts by linking to this site and clicking on the program link. During live broadcasts and one day prior, all archived programs will be temporarily taken off site to avoid excessive traffic on the network during the live program.

As an added convenience, all broadcasts are simultaneously captured during a live viewing and can be viewed at any time following the program, providing resources on demand. Courts no longer need to wait for broadcast or other DVD copies to be mailed for viewing. Multiple viewers trying to view separate programs simultaneously on the web, could slow down the local network, therefore, local courts will need to track users internally to limit simultaneous viewing, in order to avoid overload on the local court system. Program materials are linked to the videos on display. A COJET certificate is also imbedded in each of the videos online.

COJET Accreditation – Live programs have been accredited and certificates of attendance are imbedded in these programs, though not all programs listed in the archived portion of the site are accredited. An evaluation form is available on the site for viewers to complete and submit to their training coordinator for determination of applicability to the individual's job.

- f. Centra Train-the-Trainer
Patty Stansfield presented a train-the-trainer class in January 2010, to Southern region trainers and a follow-up class via Centra, to encourage field trainers and training coordinators to use Centra in training. In addition, she has offered to teach a Centra train-the-trainer in the northern region and will be teaching 2 soft skills classes per month via Centra. Patty is also working with Ken Kung on developing a short Centra class from a 3-hour MAS training. Deb King piloted the Phone Skills training in November with great success. This class will continue to be offered via Centra and scheduled on our Education Services website calendar. The Education Services Division (ESD) hopes to see more Centra soft skills classes scheduled on the website by local and regional trainers, making Centra trainings more widely available to court staff. Headsets were purchased in the event courts requested them, though ESD has not received much demand at this time.

ITD is considering using Centra for modules and backup training after their initial implementation converting cases in the limited jurisdiction courts.

COJET Accreditation – Deb King stated that ESD is looking into streamlining the accreditation process for Centra classes that are made available on a statewide basis vs. limited to a local court. ESD could act as “keeper of the record”. This would require the local coordinator/instructor to ensure the PowerPoint used in the training includes learning objectives and an online evaluation. Centra would keep track of evaluations, sign-in, PowerPoint and learning objectives. The materials could be kept on the Centra site for up to 5 years.

Centra needs to be marketed, as some courts have expressed disinterest in using the tool due to previous experiences. Some advantages to Centra are:

- Cost free to court users
- Application sharing, web safaris, breakout groups, video
- Can be used to conduct ad hoc meetings as well as trainings, to get information out quickly using slides
- 30 concurrent licenses available
- Patty Stansfield, ESD will co-facilitate a class with the trainer initially to familiarize the instructor with Centra.
- Centra co-facilitator for answering the emails and assist instructor during the online class

- g. Element K – Element K has replaced Learn2 University online training tool. The contract has been signed and ESD is working on launching the product. The tool includes all of the Microsoft 2003/07 courses (Works, Excel, Access, and Outlook) and a variety of soft skill courses (technical writing, grammar, team building, conflict negotiation skills...). The user can log in and choose a course from the listing and must request accreditation by their training coordinator. Certificates are generated for each course.

The downside, there are only 250 licenses available and they are available on a first come basis. Users are not allowed to share or shift a license to another user. Beth Asselin can transfer up to 20% of licenses within a year due to lack of usage by a user. She will counsel prospective users on taking full advantage of this tool and will create a wait list for those not able to get a license. The user has access to the site for up to one year. The number of licenses purchased this year was based on the volume of use from Learn2 users. There were only 200 Learn2 users. If the demand for access continues beyond what has been purchased, ESD will look into trying to budget for more licenses.

- h. Wendell/Web pages - <http://supreme22/wendell/COJETEdu/classroom.htm>
Wendell is an informational and training/education resource site for judges, by judges. Judges determine the content that is posted on Wendell. Al Sparrow gave a tour of the site and demonstrated the Wendell *COJET Education Center*. During calendar year 2010, per the administrative order 2009-117, judges may complete their required 16 COJET hours via independent study. ESD set up a COJET classroom to provide judges with online training specifically for judges. (i.e. self-paced courses, videos, computer-based training modules.) ESD is testing the courts' ability to download the New Judge Orientation CBT modules from this site and view them on their computers. Some courts may still have issues with access.
- i. Education Services Website – www.azcourts.gov
The Supreme Court website is in the process of getting redesigned to improve its functionality and look. Al Sparrow gave JSEC members a brief tour of the current changes to the home page and the Education Services site. Some new changes include: a News, Quick Links and How Do I section, AZ Turbo courts, Case search, Court video (oral Arguments), and the annual report. The search engine is faster and more user friendly than in the past. The Education Services Division site uses DotNetNuke modules to create its calendar and other pages, making it easy to design pages and input information on the site. Training Coordinators who would like to advertise an open

regional training can do so by sending a program flyer, sponsor contact information and an email link to Vikki Murillo to be posted on the centralized calendar. The centralized calendar makes it possible for court employees to go to one location to see all the training available around the state each month. This calendar will be posted on the internet though some security sensitive content will be restricted to court employees. (i.e. probation officer and judges training). Planning is still underway for security procedures such as a log-in for access to court sensitive information. The goal is to get all internet pages transferred over to the new site by June and the intranet pages transferred by the end of 2010.

- j. Arizona Court Association – Agenda handed out to committee members. Conference moved from April to May 19-21. Chief Justice Rebecca White Berch will be the plenary speaker. ACA is not sure yet whether they will hold a Fall conference. They may hold a one-day conference. Deb King offered the Judicial Education Center for the training. The ACA Treasurer has resigned and ACA is looking for a Treasurer elect.

4. Regional /Local Updates and Subcommittee Reports:

- a. JCCE – Joint Council on Court Education: JCCE members met over e-mail chat session prior to their January 15 meeting to develop different task groups which would focus on the education needs of various southern region courts and counties in Arizona. They formed 4 different task groups. When they met in January they held a fast track planning for the individual task groups and worked on goals for each group. The four tasks groups are:
 - i. Marketing Resources – Looking for a free needs assessment survey tool to be used by courts to determine their true training needs in order to maximize the number of people who will benefit from local trainings being developed.
 - ii. Online Resources
 - iii. External Resources
 - iv. Internal Resources

The primary goal of the committee is to try to develop ways to assess and meet the needs of various courts/entities. They will bring the task groups together to discuss what each group is doing to meet their group goals, at their next meeting April 23. Shelly Bacon inquired with Laura if trainings in Pima County are open to other counties, as she has been asked on many occasions to bring the ACA conference to the southern region. Training opportunity: “Access to Justice: Judicial Symposium”. Hon. Robert Wilson of South Tucson Municipal Court is spearheading this program with the U of A. Information has been disseminated statewide. The training is primarily for judges but staff may attend.

- b. NACE – Northern Committee on Judicial Education: Last meeting was November 19, 2009. NACE has decided to tentatively meet twice per year. The next meeting will be held May 14 in conjunction with the Training Coordinator Workshop. Goals for 2010 are to set up more networking between the Northern Arizona counties and to extend invitations to local trainings on a space available basis, at no charge. NACE member are conducting training needs surveys with their staff to identify training and presenters who would be willing to teach. They survey their staff electronically to minimize time and expense to members. Some northern region training coordinators have been videotaping their own classes and putting them in their resource libraries to make available to those who cannot attend the live class. Different counties are either planning a training conference or considering attending another northern region conference. Matt Fertig frequently brings videotaped sessions held at Maricopa County, to ESD to be put in our

Education Resource Library for checkout. **ACTION:** ESD will highlight these topics and titles in our training coordinator newsletters.

- c. Security Committee Report: The statewide committee met in October 2009. The committee is interested in providing Defensive Tactics training to security officers (county/contracted employees) working in the courts around the state. One option is to teach a train-the-trainer course and have trainers pair up with local probation officers and go to the counties to teach security officers Defensive Tactics. Kevin Jeffries and Barbara Ortolano have developed a 20 hour train-the-trainer curriculum for security officers. Currently, the AOC is looking into vetting the curriculum through professionals who do court security training, such as the US Marshals, in order to ensure the curriculum adequately meets the needs of security officers. One training consideration is that not every security officer is a court employee.

Mohave courts teamed with Probation and held a Simunitions training at Superior Court. Their goal was to simulate real life security situations and respond to them appropriately. Many scenario activities were developed for this training and exercises were videotaped to use as a learning tools. Officers learned from this training not to be in such a hurry to get people through security, as mistakes were overlooked. Next meeting will be held at the ACA conference in May. Niki O'Keeffe, AOC is working on a federal grant for "continuity of operations" planning. If a grant is received, the training will be held in August/September; lodging and materials would be covered security managers from 13 counties would be invited.

5. Action Items: ACJA Section 1-302 Code Simplification

- a. The committee discussed areas of the code that would benefit from clarification and obtained a consensus on having Education Services Division (ESD) staff continue to draft the verbiage and present to COJET without further committee review.
- b. Jeff Schrade, Education Services Division Director, commented on the need to shorten, simplify and strengthen the code section 1-302, including clean up of some historical inconsistencies. The key revision goal is to simplify and make a more accessible code for the average employee which can be understood more clearly. The revision process is lengthy. Code changes will need approval from COJET, other AJC subcommittees and AJC before going into effect. The JSEC was tasked to identify potential changes to forward to COJET in June. Some inconsistencies in the Code which need clarification and were already addressed by JSEC are:
 - i. Code 1-108: JSEC formally approval to simplify the JSEC committee standards
 - ii. Code 1-302:
 - 1. Independent learning:
 - a. Redefining Independent learning (IL) to non-facilitated learning. Verbiage suggested by Joe Legander was not approved by the committee.
 - b. Concerns that faculty training is included in the IL section.
 - 2. Training coordinator questions regarding inconsistencies in the code for:
 - a. Part-time/on-call pro tem judges training requirements (Dependent on presiding judge setting the requirement) vs. Civil traffic hearing officer training requirements (not based on whether they are part-time but based on paid vs. voluntary.)
The 8 hour reduction in COJET hours for non-judicial officer employees in 2010 did not apply to paid court staff with civil traffic duties in the court, making them subject to the 16 hour training requirement of a judicial officer.

3. Job titles not covered under code: Some cities appoint deputy/magistrates not technically called pro tems and not covered in the Code at all. There are no specific training requirements outlined for them.

c. **Exemptions 1-302, section H.3.**

- i. Committee members commented that the following verbiage should be struck from the code - *"....by acquiring COJET credit on a pro rata basis of 4 hours per quarter...."* They agreed to leave the verbiage, *"to qualify for an exemption, an employee shall demonstrate a good faith effort..."* Members commented that the presiding judge should make the determination on what constitutes a good faith effort by their employee, based on the information given to them by the training coordinator.

d. **Section I: Certification and Reporting Procedures:**

- i. Jeff Schrade asked if there was anything in the code that could be eliminated regarding reporting procedures Dyhanna Anderson commented that the report is already streamlined and easy to complete. The following sponsored program questions arose:
 1. **Why include locally sponsored programs in the COJET report? What is the information used for?** Locally sponsored programs are trainings sponsored and accredited by the training coordinator and held at their court during the calendar year. The aggregate number of accredited hours for the state is listed in the COJET report. Historically, the sponsored programs were collected to use as a resource for sharing training, it evolved into a monitoring tool and now serves as both.
 2. **Can local sponsored programs be reported at a different time of year?** There was earlier discussion to give training coordinators the option to report twice yearly. Deb King commented that ESD will email training coordinators information in June about reporting sponsored programs mid-year. Deb suggested marking an asterisk next to classes that could be shared with others, so they can be highlighted in the TC newsletter.
 3. **Wouldn't it be better to report sponsored programs outside of the code since it seems to be more of a business process?** Jeff Schrade suggested the information could be housed on the website without the onus of a reporting requirement and could be shared more freely on a real-time basis. This would achieve the goal of sharing information about programs so that training coordinators can tap existing resources.
 4. **Is it important to leave sponsored programs in the report or just collect the aggregate of classes offered?** TCs must enter the names of the sponsored programs in the report in order to generate an aggregate number of accredited classes. This takes the bulk of their time in reporting. Jeff Schrade commented, when the aggregate number is reported it is an impressive statement of the collective effort of courts.
 5. **Can a calendar/the website be used as a centralized location for people to list what they are teaching and be downloaded into an Excel sheet which ESD would compile and extract off the website?** The sponsored programs collection is a huge commitment for larger courts. They are looking for other solutions to cut the work load.

e. **Code Section E. Accreditation:**

- i. The accreditation process and requirements are outlined in this section.
Item 1.a. - Redundant and may not be necessary. Similar content is mentioned at the beginning of the section already – Jeff Schrade

- ii. Item 1.f. - Handouts are required to accredit a program. Members commented that in some of their trainings, handouts are not provided during the training, as in collaborative learning where people share best practices and a follow-up document is created after the fact.
- iii. It is common practice for staff to attend training and subsequently request accreditation.
- iv. Some coordinators do not require hard copy materials from staff to accredit a program or keep all hard copies.
- v. Independent learning – ESD will be making some significant changes to the independent learning section to modernize it, incorporating distance learning now included in training.
- vi. There is an uptick in requests for sponsorship status where an outside agency can request to be able to COJET accredit their own programs. Jeff Schrade asked the committee if giving sponsorship to outside agencies to accredit their own programs would lighten the workload for training coordinators, decreasing the number of programs they need to accredit and still maintaining quality programs (ACA is an example of a sponsoring agency.)
- vii. A JSEC member suggested allowing a regional coordinator to COJET accredit a multi-county training conference such as the Pima County Southern Region training. Rafaela de Loera, Pima County and other members commented that the county coordinator sponsoring the training already accredits the training for multiple counties attending their trainings. Members suggested making a change to the code to reflect what is already a practice statewide.
- viii. Independent Learning E.6. In order to avoid getting locked into a specific standard for accreditation of IL programs, Jeff Schrade suggested adding verbiage to the code stating that ESD will maintain a list of standards (section E. 6. a., b., c., d.). This will allow the standards to be discussed on a fluid basis and modified as needed without going through the official code process for making changes.
- ix. Jeff Schrade commented that the information discussed does not need subcommittee action before presenting to COJET. He asked for a motion by the committee confirming that ESD staff will continue to draft language and present to COJET. There was consensus by the group to move forward with these changes. No motion was made.

6. **Fast Track Planning Follow-up:**

- a. The committee broke into the following four workgroups for a 20 minute discussion on the items identified in fast-track planning, and then reported their progress back to the larger group.
 - i. **Needs Assessment Tool** – The workgroup goal was to discuss what questions to ask on a needs assessment and what should be done with information obtained. The expected outcome was to identify the target audience and a list of needs assessment questions. The workgroup commented on how Zoomerang.com, a survey tool purchased by ESD can generate online surveys per county and then be compiled into a statewide survey with the use of Active Directory. Non AJIN courts would have the ability to participate. The survey would be sent via email. Survey questions would include: job category, location, court type/county, matrix identifying types of training modalities (break down into specifics). **Workgroup members:** Laura Beeson-Davis and Mary Blanco, JT Hilton.
 - ii. **Enhance the Website** – The workgroup goal was to discuss website content on the ESD/TC websites and make recommendations for what content would be valuable on the site. The expected outcome was to highlight essential information already on the pages and comment on content that should be added.

The workgroup did not have the chance to discuss specific content but identified key content areas. The next step will be to identify what training coordinators need on their site. The TC site will also be made available to court employees.

After reviewing the new ESD internet site, Deb King suggests condensing the committee information on the ESD page to two paragraphs and replacing committee information with links to the calendar, COJET FAQs, and a training coordinator search/information feature, to make the site more useful to users.

Workgroup members: Shelly Bacon, Kathy Schaben, Kip Anderson.

The workgroup identified 3 major areas (links):

1. **Resources** –
 - a) Statewide calendar of events including “at a glance” (hover capabilities, option to change calendar view, link to event details and program contacts, ability to advertise/post programs with registration open statewide, post only non-profit and court associated associations
 - b) Links to Court Reporter/Interpreter Associations, ACA, Element K, ERL, Distance/onsite learning, Wendell
 - c) Links to recommended resources such as book lists, movies for training...
 2. **Contacts** – Create a search feature to identify local training coordinators/or TC/Field Trainer directory and description of their function, ESD contacts
 3. **Requirements** –
 - a) COJET requirements page - ESD website is lacking an information page on COJET requirements for new employees.
 - b) COJET FAQs
 - c) Q & A - pro tem, staff, judge questions, accreditation...
 - d) Search feature - What are my requirements?
 - e) Generic forms - Are these forms being used by training coordinators. Ask them
- iii. **Broadcast and Distance Learning** – met to discuss broadcast topics and identify key learning objectives, target audiences. The expected outcome was to provide enough information to ESD to begin developing the broadcast, topic, subtopics, target audience, subject matter experts, and faculty.

Workgroup members: Michelle Wellner, Bob Lawless, Theresa Barrett.

TOPIC: Overview of AOC and Division websites (AJIN website and internet resources tour) Ethics

1. Target audience: all court employees
2. Learning objectives: Find available resource and better navigate through the internet
3. Subtopics:
 - a. Overview of AOC divisions, rules form, Code section form, committee pages, protocol
 - b. Brief intro by the Chief Justice (tie into 2020 vision)
 - c. Tips on internet/intranet use, how the network operates
 - d. Proper use of the email, internet, do's/don'ts when using network
4. Subject matter expert (SME): Jeff Schrade

TOPIC: Diversity Training:

- Target audience: All employees
- Learning objectives: Understand that diversity is an ongoing process
Cultural sensitivity and awareness, neutrality, security officers
- SME: Commission on Minority members, judges, representatives, Gabe, Goltz, Deb King

TOPIC: How to maintain morale during difficult economic times

1. Target audience: all court employees
2. SME: Jeff Fine, Goodyear Municipal Court – teaches “Doing Less with Less”

TOPIC: Personal safety at home/work

1. Target audience: all court employees
2. Learning objective: Safety awareness at home and at work
3. Subtopics: Taking care of self/family at home, identity theft, internet safety, safety in the parking lot at night
4. SME: Bob Lawless, Rick Sczerbicki, Kevin Jeffries

iv. **Training Coordinator whistle stop 2010** – met to discuss possible agenda and whistle stop topics. The expected outcome was to identify content. **Workgroup members:** Mark Stodola, Dyhanna Anderson, Rafaela de Loera, Elisa Ochoa

1. Rafaela de Loera suggested to query TCs for suggestions on topics via email prior to the workshop for issues/needs, requests for curriculum
2. Whistle Stop topic: Dyhanna Anderson suggested creating a reference sheet on the logistics of setting up a webcast at your local court (computer setup, making arrangements, staff communication)
3. Proposed plenary topic:
 - a. Share proposed changes to ACJA 1-302 with TCs to get feedback prior to forwarding changes to COJET.
 - b. Ask Judge Song Ong to speak on COJET and its role; JSEC share upcoming projects request how they can serve training coordinator needs, provide training update around state.
4. Mark Stodola suggested routing JSEC/COJET minutes to training coordinators after each meeting, to make them aware of what COJET is all about.

7. Trainer Excellence Nomination Program

- a. Deb King asked the committee how they would feel about COJET sponsoring the Trainer Excellence Awards in the future in lieu of JSEC. The consensus of the group was that it made sense to consolidate the awards under the umbrella of COJET to give the award more value and be able to recognize larger groups of recipients including judicial officers, staff, and probation. No motions were made. The JSEC will continue to review nominations received for court staff and make a selection of up to 7 awardees as in the past. Names will then be forwarded to COJET for approval by acclamation. The same will be done by JCA and COPE for trainers in their target audiences.

Rafaela cautioned committee members take care not to allow the original goal of recognizing volunteer court staff that provide excellence in training court employees statewide, to fade away slowly. She stressed it is important to ensure that line staff are equally represented in receiving this award among judges and probation officers. Jeff Schrade assured her that this should not be an issue as the process of selection by JSEC has not changed.

8. **New Business:** Deb King publicly recognized Mark Stodola on behalf of the JSEC Committee for his dedicated service to the Judicial Staff Education Committee as Chair in the past 2 years. She presented him with a certificate and gift and personally thanked him on behalf of the JSEC for his work on the committee. Mark will be retiring from the Court and his position as Chair.
9. **Call to the Public:** No response.
10. **Next Meeting:** Agenda topics: None mentioned.
 - a. Next meeting August 17, 2010.
 - b. Motion 2010-02. Laura Beeson-Davis moved to adjourn the meeting, Shelly Bacon seconded the motion.

Meeting adjourned at 2:10 pm